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ABSTRACT

Market research, important for professional renewal, is a critical part of continuing education program planning. It includes attention to learning needs and learner motivation to participate in continuing education. Informal market research makes use of internal sources, such as enrollment data, program evaluations, policy statements, and staff members and volunteers; and external sources, such as other program providers, professional development activities, and market research literature. Formal market research with individuals includes surveys, the Delphi technique, face-to-face interviews, and telephone interviews. Group research techniques include the nominal group and the focus group. Philosophy of education, personal preferences, and the work environment influence market research. The steps in executing market research are as follows: (1) decide what to research; (2) consider the resources available; (3) determine the best time to do research; (4) choose a market research approach; (5) recruit people to help; (6) develop a preliminary plan for the research; (7) develop a budget; (8) plan how to use the data; (9) collect and analyze the data; and (10) use the data to make decisions. (Thirteen references and 33 annotated resources for further study are listed, including 3 in marketing, 4 in market research in continuing education, 19 in market research methods, and 7 in research skills.) (CML)

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Building Participation through Market Research

M. Donald Campbell

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The Guide Series

in Continuing Education
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Building Participation through Market Research

M. Donald Campbell

The Guide Series

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Foreword

In recent years, those planning continuing education programs have become more concerned with why individuals participate than in what their educational needs might be. Competition among sponsors is one of several reasons for this change in interest.

M. Donald Campbell has combined his experience as a successful program planner with a careful examination on proven market research methods to provide an exceptional guide to this important aspect of program planning. He offers the reader a number of options to consider when gathering information about potential interest in an activity is necessary.

Along with clear descriptions of different approaches, Dr. Campbell analyzes their strengths and weaknesses and strongly emphasizes the role planners must play if this aspect of the planning process is to be an effective one. Equally important, he clearly reminds all of us that returning to analyze the various audiences we serve and our programs is a necessary step if we are to avoid dangerous complacency about the quality of our programs and the stability of participation.

Charles E. Kozoll
Editor
Guide Series

About the Author

M. Donald Campbell is director of continuing education and extension at the University of Wisconsin-La Crosse. Formerly, he was director of continuing medical education at the University of Illinois College of Medicine at Urbana-Champaign. His publications and presentations have focused on the impact of continuing education on professional practice and on research in continuing education.

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Introduction

You have just been hired to develop continuing professional education programs for middle managers. You have limited work experience, but you know that middle managers often want to improve their communication skills. You plan to develop a series of workshops on such topics as active listening, professional writing, and public presentations, which would be part of a certificate program. You can hardly wait to begin but are not sure how to proceed. You wonder whether to focus these workshops at a beginning or an advanced level, how many workshops to offer, where they should be held, how long they should last, and how much they should cost.

Or you have just accepted responsibility for arts and humanities programs in a university continuing education division. You have a strong liberal arts background and extensive experience in planning educational programs. You are pleased with this new opportunity, because you believe many adults, middle-aged and older, would like to increase their understanding of the liberal arts. You would like to develop programs that examine contemporary social problems at the local, national, and international levels from a liberal arts perspective. You wonder, though, who would participate. Could some programs consider problems that certain professionals confront in their practice? Or should these programs appeal more broadly to the general public? What social problems would participants want to investigate? How much would they pay for these programs?

Or you are an experienced program planner, regularly offering a variety of annual conferences for health professionals. Working with experts from various disciplines, you have planned conferences on family practice medicine, health promotion, problems of aging, health care management, and other health-related issues for several years. These conferences have been very successful. Enrollments have been high, participants have appreciated the sessions, and revenue has been more than adequate. You are proud of your accomplishments, but have lost some enthusiasm for these annual events. Planning has become routine, and you wonder if the conferences are challenging the participants to change any part of their professional practice. Conference attendance is still good, but you are concerned that enrollments have not been increasing of late.

Whether you are new to the job or a veteran program planner, market research is a critical part of program planning. Regardless of your experience or previous success, researching what will draw adults to a continuing education program is an important first step. Studying your market before plunging into planning can help answer your questions about how to proceed. Even if you think you know exactly what your audience needs,

these adults must share your enthusiasm. If they do not, you and your instructor may say hello to an empty room when it is time for the program to begin.

You may have a track record of successful programs, but ongoing research is important to guide your planning. Although adult learners have found your programs useful in the past and continue to participate in them now, there is no guarantee they will attend next year or the year after that. Program quality may decline slightly. The change may not be noticeable, and the participants may still be learning. If the decline continues, however, attendance may drop off significantly. On the other hand, program quality may remain very high, but the clientele may change. Change occurs continually, whether in a particular profession, a local community, or society at large. If year after year programs are based on needs you documented years ago, sooner or later these programs will become irrelevant.

Market research is also important for your own professional renewal. Program planning is often exciting, but it can easily become dull. Being a step or two removed from the participants is an occupational hazard of program planning. Planners do not face the same direct challenge or gain the same stimulation from the learners as the instructors do. Unless you make an extra effort to interact with the learners, you may not know why they have come or what they take with them. Given the myriad details endemic to the life of a program planner, you may be so encumbered by the ABCD's of program planning (administration, brochures, budgets, coffee, and donuts) that you rarely focus on the E (education). After a while, you may lose interest in the programs. Taking time to reflect on what is best for the learners is an important way to renew interest in and commitment to program planning.

We will discuss why understanding your clientele has become so important and then present both informal approaches and more formal market research methods. For each formal method, we will describe the method briefly, list its advantages and disadvantages for continuing education market research, and offer key points to consider when using the method. We cannot discuss each method thoroughly, but readers who want more detailed information are referred to additional references. Then we will discuss how you, the program planner, play a critical role in the process and how you can proceed with market research, in addition to, or perhaps in spite of, all your other responsibilities.

This publication is not a definitive discussion of market research. We will not describe all dimensions of marketing. Instead, we will show how a

marketing orientation differs in some respects from more traditional approaches to needs assessment. Readers who want an in-depth treatment of marketing in continuing education should consult references listed at the end of this publication.

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For the last two decades at least, program planning approaches in continuing education have stressed the needs of the learners. An early step in these approaches is to discover what the adult needs or wants to learn. Then the program is developed to meet these needs and wants.

Learning Needs

These program planning approaches are based on Ralph Tyler's (1949) principles of curriculum development. Although Tyler was writing for elementary and secondary school educators, his principles have strongly influenced continuing education as well. He argues for studying the learners to determine the changes needed and then developing educational objectives designed to produce these changes.

Applying Tyler's principles to continuing education is not as straightforward as it may seem. One reason is a different clientele. Tyler had a captive audience in mind: elementary and secondary school students. They marched into the building, whether they liked it or not. The challenge for the educator was what and how to teach these bright, shining faces.

Educators of adults face the same questions, but they have an additional challenge. Because participation in most continuing education programs is voluntary, the program planner must first determine how to attract adults to a learning experience. Simply focusing on the needs of the learner is not enough. The program planner must also consider what will motivate adults to participate. Needs can be well documented and good programs developed, but adults may not enroll for a variety of reasons.

A second reason Tyler's principles are problematic for continuing education is that social changes have occurred during the past two decades. His curriculum development principles were published right after World War II, as both our economy and the size of our families were expanding. The expansion and economic prosperity continued through the 1950s and 1960s. During these decades we felt, as a nation, that we could afford to do almost anything.

At the same time, education was expanding at all levels. First, elementary and secondary schools proliferated to accommodate the children born after the war. Then in the 1960s and the first part of the 1970s, higher education expanded to serve the "baby boom" generation that was ready for college. Girded by an expanding economy, local communities and state legislatures routinely approved new schools and universities.

Adult education also expanded during these decades, buoyed up by this same "can do" spirit. If a new program was needed, we could develop it. Not surprisingly, adult education literature produced in this period focused on the needs of the learners.

By the end of the 1970s, however, the tide had turned. We realized there were limits to what we could do. We could not develop a Great Society at home and fight an undeclared war in Asia at the same time. Then we wondered if we were depleting our energy resources. As energy prices soared and a severe economic recession followed, we asked if American business had lost its competitive edge. We began to think less about the needs we could meet and more about the resources we had available.

Changes in education paralleled these social changes. As less money was available for education from federal, state, and local governments, we began to think more about what we could accomplish with the resources available. Just because a new program was needed did not mean that a school or university could develop it.

A third reason that makes Tyler's principles difficult to apply to continuing education programs is the proliferation of providers. This expansion in continuing education has paralleled contraction in other educational institutions. The baby boom generation is leaving college now and needs to continue learning. Two or three decades ago, continuing education was primarily the province of land grant universities. Now virtually every research and comprehensive university, private college, and community college has some kind of continuing education program. Major employers have increased their commitment to education and training. Community organizations have expanded their lifelong learning programs, and private entrepreneurs, offering seminars on a variety of topics, dot the landscape.

Since providers of continuing education abound, we should not feel we have to meet every adult learning need. We must consider whether a potential program fits the mission of our organization and is considered a priority. We cannot be "all things to all people." Instead, we must find our programming niche and develop it well.

Less emphasis, then, is placed on the needs of the learners as the primary basis for program planning for three reasons. First, adults usually are not a captive audience. They typically participate voluntarily in continuing education programs. We must consider not only what they need to learn, but also what will motivate them to attend an educational program. Second, social and economic changes have made us more conscious of resource limitations. Third, providers of continuing education are much more numerous now than three or four decades ago. Just because a program is needed does not mean that our organization can or should provide it.

Motivation and Resources

Carol Aslanian (1985, p. 41) discusses these same factors. Focusing on higher education, she notes that

> the literature on market assessment in adult education is replete with surveys that assess need. . . . But times have changed. Limited public funds, the proliferation of self-supporting campus adult programs. . . and increased competition require colleges to examine more than just "interest." . . . Surveys of adult learning that deal with "need" or "interest" have yielded results that grossly overestimate what adults actually will do. This is probably because needing or being interested in something does not automatically mean that adults will study something.

We do not mean that the needs of adult learners are irrelevant and should be ignored. Needs alone, however, are an insufficient basis for program planning. We must also understand what will motivate adults to participate in educational programs and what resources they have to do so.

Our approach to market research is based on Aslanian's framework of needs, motivation, and resources. Examining what adults need to learn is an important activity, but we cannot stop there. To develop successful continuing education programs, we must try to understand what will motivate adults to participate in our programs. We must also try to determine the resources they have available, notably money and time, which enable them to cross the threshold and enroll. We do not want our programs priced beyond their means. Nor do we want them offered at a time, in a format, or at a location that is inaccessible to them.

Admittedly, incorporating motivation and resources into market research is much more difficult than simply reporting learning needs. Perhaps that is why we often limit our studies to needs assessments. As much as possible, however, given the constraints we all face, we must go beyond what adults say they need to learn. We should always try to envision a successful program and ask ourselves what will make it so.

Ultimately, the purpose of market research is to predict what adult learners will do. The time-honored approaches to assessing needs are an important component. But market research should also include efforts to determine whether adults will do something about their needs. Will they actually enroll in a course?

Program Planner's Contribution

Market research is often perceived strictly as a formal data collection process. We may think of conducting a formal research project to document

adult learning needs and then feeding that information, somewhat mechanically, into a program planning exercise. Sometimes a report, or even just the raw data, can sit indefinitely in a crowded office corner and never influence program planning.

You, the program planner, however, are the critical ingredient in market research. In addition to any formal market research, you should also gather information informally to help generate these program ideas. When you do conduct formal market research, you must interpret this information. Since you are responsible for program planning, you must judge whether the need is important and whether your organization should address it. If you do proceed with planning, keep in mind the other components of market research: learner motivation and learner resources.

We will describe ways of doing both informal and formal market research. Throughout this discussion keep in mind your role as program planner. The final section (chapter 5) discusses how to proceed with market research, showing how your personal strengths and weaknesses, your own philosophy of education, and your working environment all influence your approach.

Chapter 2
Informal Market Research

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Important market information is often obtained informally. You are gathering this information all the time, whether you realize it or not. You are influenced by your own organization's history of continuing education programs and by the desires and expectations of colleagues. You become aware of programs that other organizations offer. And you begin to form program ideas while reading and reflecting on social changes. These sources of information can all be used more consciously for market research.

Internal Sources

Enrollment Data

Within your own organization, a frequent informal approach is to review past programs. This review is easily done, but typically we fail to take full advantage of the data these internal records provide. We record program enrollment and financial results, but often do not take time to study them.

Examples of questions to ask as you review enrollment data are:

1. Do the programs attract the audiences for whom they are intended?
2. What professional groups are represented?
3. Do interdisciplinary programs attract mixed audiences, or does one profession account for 90 percent of the participants?
4. What age groups are represented? Do you tend to attract one age group more than others?
5. How many people have participated in more than one program during the past two years?
6. What communities are represented? Are the participants primarily from the local community? Do virtually all of them live within an hour's drive of the program site? Do they come from all over the country or primarily from your region?

For a more detailed discussion of reviewing existing records, see Falk and Miller (1986, pp. 25-27).

This often overlooked information is important for understanding who will actually come to the programs. You know that these people had identified a learning need that the program was designed to meet. More importantly, though, they did something about that need. They were

motivated to attend, obtained the resources to do so, and overcame any other potential barrier to participation.

This review of internal market data can guide your program planning. If the analysis indicates that the programs for schoolteachers are serving exactly whom you want to serve, you know you are on track. If the review shows, however, that the programs are drawing primarily mid-career teachers, you may want to focus more programs on their needs. Or you may decide to work harder at attracting less experienced teachers. If administrators are not enrolling, you may need to change the program content or format to attract that group. Do not think, though, that everyone can be served. Understand who your participants are, and make sure you meet their needs. Then consider serving others.

Program Evaluations

Another source of informal market data is program evaluations. At the end of virtually all continuing education programs, participants are asked to complete an evaluation form before they leave or to mail it back soon after returning home. Typically these forms ask participants to rate the content of the program, the instructor, the format, and the facilities. While reviewing these evaluations after each program, you are forming impressions that guide future planning efforts. If the learners were dissatisfied with the program, you know it did not meet their perceived learning needs. If you want them to return to future programs, you will have to plan differently.

Evaluation forms can suggest ideas for future programs. Ask participants what other programs they believe are needed and would attend. Ask them what areas they would like to examine in more detail and what other topics interest them. Consider these ideas now, but do not put them away and forget about them. Be sure to review the data again before beginning your next planning phase.

Policy Statements

Other sources of information exist within an organization. Every organization has some kind of mission statement that describes its purpose. Annual reports, long-range planning documents, policy papers, and other documents provide a framework for the continuing education programs of your organization. These documents address the clientele to be served, content to be considered, and instructor qualifications. A university, for example, may view continuing education as an extension of its academic programs and limit offerings to those that its own faculty can provide. Another university may emphasize responding to identified needs by hiring ad hoc faculty to address these needs.

These policy statements may also discuss whether the continuing education operation should be fully self-supporting or subsidized in some way. The organization's policy on self-support will influence the fees you must charge, which in turn influences the audience you can attract. For example, programs for social workers and human services professionals may need subsidizing, because these professionals have lower incomes and their employers have limited professional development funds. Programs for physicians, lawyers, and engineers, on the other hand, may not be hurt by high fees.

These documents establish the boundaries for the continuing education programs you will offer. Do not attempt to offer every program that is needed or of interest to you. Some programs, no matter how exciting or how necessary, will be intended for a clientele your organization does not serve or will include content your organization lacks the instructional resources to address. Although "in practice, attention to local agency objectives and traditions as a source of new program ideas tends to be implicit and informal" (Nowlen, 1980, p. 19), we urge more intentional use of these materials to help set program directions. These documents obviously are important for a new program planner to study, but periodically they provide a helpful review for an experienced planner as well.

Staff Members and Volunteers

People within the organization are another source of informal market information. Superiors, peers, and subordinates, as well as individuals serving on the organization's advisory boards, all have a perspective to offer. Use every opportunity to interact with these people to do informal market research. Their understanding of the organization's history is important, especially for a new program planner. Their vision for the future can keep you from getting into a rut. These colleagues are also potential sources of new program ideas or excellent reactors to new ideas.

Working with committees is another way to gain information from staff and volunteers. Standing committees have ongoing responsibilities, but they may agree to offer program ideas as part of a regular meeting. Ad hoc committees can be organized to investigate new program initiatives and then participate in planning these programs. For a guide to working with planning commitees, see Kozoll (1980).

External Sources

Other Program Providers

Outside your organization, study the programs other providers are offering. Review their brochures and other promotional materials. Many

already send you their catalogs and brochures. Ask others to add your name to their mailing lists. Look at brochures displayed at conferences. Talk with your colleagues at these conferences about their successes and failures. These promotional materials suggest ideas for entire programs, individual sessions, and faculty members who can address specific topics.

Analyze this information carefully. Just because another provider offers a program does not mean you should. Your organization may have a different mission or may not have the academic expertise to offer a quality program on that subject. A continuing education program for nurses may require an instructor with expertise in physical assessment, but you may not have access to faculty members with the right qualifications.

The converse is also true. Just because another provider offers a program does not mean you should not offer that program or one similar to it. The demand may be strong enough for more offerings. Large numbers of classroom teachers may need instruction in the latest approach to elementary science education. You may attract a different clientele than another organization would, or you may draw your audience from a different part of the country. When considering whether to offer a similar program, ask yourself the following questions.

1. Does our organization have a similar mission?
2. Do we have faculty members who can address this topic? Are they willing to offer the program?
3. Are there enough potential participants in our market area to make this program feasible? Will they recognize that our organization has the expertise to offer it?
4. Are more offerings of this program needed, or is the market saturated?
5. Do we have a sufficient funding base to offer this program? Will people enroll if we have to charge a higher fee?

When studying other providers, however, remember your own ideas. What do you think is needed? What programs do you think would be effective? Do not get so distracted by what other organizations are doing that you fail to cultivate your own perspective on program planning.

Professional Development Activities

How do you get your ideas? Professional development activities are one way. Conference sessions that discuss the learning needs of professional groups can suggest specific program ideas. Other sessions that address issues of importance to that profession can yield insights into how to appeal to that group. Conversations with participants, however, often are more

helpful than the sessions. These conversations can help you understand what will motivate people to attend your programs and what resources they have to do so.

Literature

Professional literature that discusses learning needs or gives insights into the profession is obviously important, but other literature is helpful too. For example, educators and others have given us their ideas on future changes that will influence our society. Harold Hodgkinson (1985), while claiming not to be a futurist, charts the future implications of demographic changes that have already occurred. What do these changes suggest for continuing education?

Other demographic literature is available as well. Thanks to computer databases and an increased interest in marketing, periodicals such as *American Demographics*, *The Futurist*, and *The John Naisbitt Trend Letter* have emerged that discuss demographic and lifestyle changes. Source books provide household population, income, age, and racial information broken down to the individual county level. Some publications profile purchase patterns and lifestyles. Others summarize consumer market research studies. These publications may not give you specific program ideas, but they do offer insights into social changes in our culture.

Some of us tend not to read. We are active people who like to get the job done. We prefer conversation to crawling into a corner with a book. That is why we enjoy program planning. We like to be busy and feel uncomfortable if we are not. When colleagues ask how we are doing, we make sure we tell them we are busy. We would feel guilty and perhaps judged negatively to say otherwise.

Do not overlook the value of reflection. If possible, set aside two hours each week or a half day every month. Or take a full day every six months. Find a quiet place out of the office to read and think about what you are doing and where you would like to go.

If we fail to develop the capacity to read and reflect critically, sooner or later we will ease right into irrelevance. Nowlen (1980, p. 14) reminds us that "the origins of the continuing education programs lie not simply in evolving life roles, new government legislation, community problems, the increasing employment of women, or additional leisure time but in the minds of adult educators."

Chapter 3
Formal Market Research

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In addition to ongoing informal market research activity, formal research projects are important. We will discuss methods for collecting data both from individuals and from groups. We will describe each method briefly, list advantages and disadvantages, and mention key points to consider for use with continuing education programs. Because this discussion cannot be exhaustive, consult the references listed at the end of this publication for more information.

With Individuals

Surveys

Conducting a survey may be the most frequent approach to formal market research in continuing education. If not the most frequent, it is at least the method new program planners choose first. Typically, a sample of potential participants are asked what educational needs they have and which continuing education programs they would attend. Or a select group of professional or community leaders is asked what their constituency needs to learn.

Surveys can be conducted by mail, by telephone, or in person. Our discussion will focus on mail surveys, the method used most often in continuing education. Later sections will discuss both telephone and face-to-face interviews, which have some similarities to surveys.

Advantages

1. *Well-known method.* Most program planners, even if new to their position, have some idea of how to conduct a mail survey. Through graduate or undergraduate research methods courses, they may have been introduced to survey research. At the very least, they, along with most of the general public, have undoubtedly received questionnaires in the mail that asked them to evaluate a magazine they read or to answer questions about their lifestyle. Because mail surveys are so widely used, most potential respondents are familiar with the method. This familiarity may influence them to participate in a survey.

2. *Wide distribution.* A mail survey can reach everyone with an address, courtesy of the postal service.

3. *Low cost.* For many market research projects, one professional staff member with survey research skills can conduct virtually the entire survey from start to finish. Some secretarial help is needed as well. Aside from staff time, the only direct costs are for printing and mailing.

4. *Valid data.* When people take time to complete a questionnaire, they typically give good information. Because they can answer in the privacy of their homes or offices and know their responses can be kept confidential, they are less likely to give socially desirable answers than in an interview or group discussion.

Disadvantages

1. *Need for mailing list.* Obtaining a good mailing list can be difficult or expensive. Unless a survey will clearly benefit their membership, many organizations are reluctant to release their mailing lists. All varieties of mailing lists can be rented from list brokers, but renting adds to the cost of the project.

2. *Declining response rate.* During the past two decades the response rate for mail surveys has declined (Frey, 1983, p. 39). Because mail surveys have become a popular way to assess educational needs, as well as to study various facets of human behavior, people may resist completing yet another questionnaire. Some people may wish to protect their privacy. Others may have completed so many surveys that they simply toss the next one they receive. Or they may set it aside for a while, envisioning some leisurely Friday afternoon when they will have time and inspiration to complete the survey. More often than not, that Friday afternoon never comes, and the questionnaire quietly dies a pigeonhole death. The only respondents eager to mail surveys may be people who have time on their hands, have never been surveyed before, or have great sympathy for social science research.

3. *Lengthy process.* A comparatively long time is needed to complete data collection. Once the questionnaires are in the mail, the respondents control how quickly information is obtained. Two months is a typical time period to allow for responses to an initial and a follow-up mailing.

4. *Limited data.* The type of questions used for a mail survey is limited. Questionnaires must be understood easily and not demand too much effort from the respondent. The type of responses is also limited, frequently multiple choice or rank order. Some questions can ask for a short answer, but generally questions requiring a long answer will discourage respondents from answering. Complex or follow-up questions cannot be asked to clarify meaning or seek additional information. Emotional intensity and commitment to participate in a continuing education program are difficult to determine from questionnaire responses.

5. *Discrepancy between questionnaire responses and actual behavior.* Data collected from a mail survey may indicate a need for a particular continuing education program. When that program is offered, however, too

few people may enroll. One reason for the discrepancy is that respondents tend to express interest in programs with which they are familiar. Yet that expression of interest does not indicate they will take the time and find the money to enroll (Nowlen, 1980, p. 32). Another reason for the discrepancy is that respondents are offered too many choices. Often the questionnaire presents a long list of possible perceived needs and an equally long list of potential continuing education programs. The respondents may check all the needs they feel and all the programs for which they have any interest at all. As a result, the mail survey does not provide a significant opportunity to evaluate motivation to participate in particular programs.

Key Points

1. *Pilot test the questionnaire.* You may be tempted, especially if you have experience with survey research or are pressed for time, to develop a questionnaire too quickly. Do not try to draw up a questionnaire in the morning and pop it into the afternoon mail. Share sample questions with colleagues to get their reactions, and then develop a draft questionnaire. Select a small sample of up to twenty people similar to the population you have chosen to study, and administer the questionnaire to this group. Ask them to include both their answers to the questions and their reasoning in answering the questions. That way you will know if your questions are communicating what you intend.

2. *Ask questions in the most appropriate order.* Give the respondent a chance to warm up with easy, nonthreatening questions. Place more difficult or threatening questions near the middle of the questionnaire after respondents have hit their stride. Leave questions about age, income, education, or other personal information for the end.

3. *Keep the questionnaire as short as possible.* We all have a tendency to make a questionnaire too long. As long as I have your attention, we reason, I might as well include a few more questions. A lengthy questionnaire can contribute to a low response rate. Avoid the other extreme, however, and do not make the questionnaire too superficial. Ask the questions that you need to ask.

4. *Design the questionnaire to look professional.* A questionnaire can be attractive without costing a lot more to produce. Printing it in booklet form, using tan, gray, or another neutral color, can usually be done inexpensively by an in-house copy center.

5. *Code the questionnaires for tracking responses.* Use a numbering system that enables you to determine who has and has not responded. Place the respondent number on the questionnaire in an inconspicuous place.

6. *Include a cover letter.* State the purpose of the survey, what it will accomplish, what organization is sponsoring it, and how the respondents have been selected. Explain the purpose of the code number, and assure respondents you will treat their responses confidentially. Give a date to return the survey, typically two or three weeks.

7. *Send a follow-up mailing.* One week after the return date, send a reminder letter and another questionnaire to those who have not responded. Ask them to return it as soon as possible, but indicate another due date. Another way to follow up is to send a reminder letter or postcard on the return date to all respondents, asking them to complete the survey if they have not already done so.

Delphi Technique

The Delphi technique was developed in the 1950s by the Rand Corporation as a way to forecast national defense needs. It takes its name from the Delphic Oracle of ancient Greece, whose function was to help predict the future. Today the Delphi is a good market research technique, both for projecting future needs and for confronting current problems.

The Delphi is a series of mail surveys designed to develop consensus about a particular problem or issue. The first questionnaire typically is limited to one or two open-ended questions. The responses are tabulated, sorted into categories, and compiled into a list of problems or issues. This list is incorporated into a second questionnaire, which asks the respondents to rate the importance of each problem or issue and to offer any reactions to the list. For example, respondents may argue for other problems or issues too important to omit. A third questionnaire may be developed to ask the respondents to rank order the top five or ten vote-getters. It may also include a summary of comments included on the second questionnaire and ask for additional reactions. The end result, then, is consensus about what the respondents believe to be the most important problems or issues.

In continuing education the Delphi might be used to determine what skills a profession will need in the future or what demands for services an institution will have to accommodate. The process also might be used to predict how a community will change or what needs that community will have for educational programs.

Advantages

1. *High participant motivation.* Because Delphi participants are carefully selected, they are usually more highly motivated to complete the questionnaires than are regular mail survey participants. They typically will take the time to offer thoughtful responses.

2. *Sense of closure.* Unlike respondents to a mail survey, Delphi participants know how others have responded to the questions. This feedback and the subsequent questionnaires help them feel that their ideas are leading to some resolution. Feedback also helps them learn more about the particular issues

3. *Widely scattered participants.* The Delphi is a manageable process that can include geographically dispersed respondents. Organizing a meeting for them to develop consensus on a particular problem or issue would be much more difficult and expensive.

Disadvantages

1. *Limited participant interaction.* Anticipating future needs is often difficult. Having a chance to talk about the subject with other people can help project beyond the demands of the present. Delphi participants, however, must respond to the first questionnaire without the benefit of interaction with other people. Although some feedback from other participants may be included on subsequent questionnaires, they cannot discuss that information among themselves. Because of this limited interaction, responses to a Delphi process may be less thorough and creative than responses that the same people would generate if they could meet face-to-face to discuss the issues.

2. *Respondent dropout.* Although participant motivation may be high, inevitably the sample gets progressively smaller. Each time a questionnaire is distributed, some people will not return theirs.

3. *Time-consuming process.* The Delphi takes almost as long to conduct as three separate mail surveys. Some time can be saved by giving the participants less time to return their questionnaires than for a one-time mail survey. Because these individuals have agreed to participate in the process, they can be expected to return their surveys sooner.

Key Points

In addition to the key points for conducting a mail survey, the following points are important for the Delphi technique.

1. *Select knowledgeable, future-oriented participants.* Delphi participants must be well informed about the particular profession, organization, or community under consideration. They also need the ability to see beyond the present situation into the future. Not everyone who is well informed about present issues is able to develop this future orientation.

2. *Select the appropriate sample size.* The Delphi usually calls for a more selective sample than a general mail survey. For some projects with

high participant motivation, only 10 to 15 carefully chosen individuals are necessary (Gilmore, Campbell, and Becker, 1989, p. 45). For other projects, a larger sample is preferable to protect against dropouts. To estimate the appropriate sample size, assume that for each round as many as 25 percent will not return the questionnaire.

3. *Allow less time for return of questionnaires.* Instead of allowing three or four weeks, ask participants to respond in two or three weeks. If a follow-up mailing is done, give them only one or two more weeks to respond.

4. *Decide how to handle dropouts.* People who fail to return the first or second questionnaires may be eliminated from the next rounds. Or they may be given another chance to respond to what the other participants generated. If nonrespondents are eliminated from future rounds, consider the effect on sample size. With a 25 percent dropout rate each round, only 48 of 64 individuals may return the first questionnaire. For the second round, only 36 of the remaining 48 participants may return the next questionnaire. For a third round, only 27 of the remaining 36 may return the final questionnaire. The result would be a final response rate of only 42 percent. Because of this significant attrition, including all original participants in each round is desirable. Do so, however, only if inclusion of non-respondents will not skew the results.

Face-to-Face Interviews

Interviewing can be an exciting way to conduct market research because it provides the chance to talk directly to respondents. If you like talking with people one-on-one in a face-to-face setting, interviews can be a fascinating opportunity to gain insights into people's needs and motivations.

Interviews can be formal or informal. Informal interviews are similar to ordinary conversation. They are an example of informal market research and will not be considered in this section.

Formal interviews can be highly scheduled, moderately scheduled, or nonscheduled. A highly scheduled interview follows a very specific set of directions. Interviewers must ask all the questions on an interview schedule, using the exact words and following the same order. They are told what follow-up questions to ask if certain responses are received. Nonscheduled interviews allow the interviewer much more freedom. Interviewers are told only the goals of the interviews. They must then decide what questions to ask and in what order to obtain the desired information.

Moderately scheduled interviews fall between these two extremes. Interviewers typically receive a list of questions to ask, but they are free to vary the way the interviews are conducted. They can, for example, ask the

questions in a different order, follow up highly productive responses at great length, or skip questions that clearly do not apply or have already been covered.

Advantages

1. *Good response rate.* Many people who will not return a mail survey will agree to be interviewed. They may be very busy, but somehow they can squeeze another appointment into their schedule. People like to talk about themselves and feel important when singled out for their perspectives.

2. *Immediate information.* Unlike surveys, which require a lengthy wait for mail returns, interviews provide information quickly. As soon as the interview begins, the interviewer can develop impressions of educational needs and motivation to participate in programs.

3. *Wide range of information.* An interview provides the opportunity to ask a greater variety of questions than in a mail survey. More complex questions can be included, because the interviewer can explain their meaning if the respondent does not understand. More open-ended questions can be used, because respondents typically prefer to talk than to write. Interviews also allow follow-up questions to clarify the meaning of responses or seek additional data. If the interview is not highly scheduled, these follow-up questions can lead to discovering unanticipated information.

4. *Insights into motivation.* Compared with a mail survey, an interview offers significantly more opportunity to sense emotion. Responses to a mail survey must be taken at face value, but an interview can reveal how strongly people feel about their statements. As a result, the interview can suggest how motivated respondents are to participate in a continuing education program. Even if respondents are not asked directly about their motivation, the interviewer can sense genuine interest or simply mechanical responses to the questions.

Disadvantages

1. *Need for trained interviewers.* The extent of interviewer training depends on how scheduled the interviews are. For highly scheduled interviews, relatively little training may be necessary. Because interviewers receive very specific instructions on the interview schedule, they may need only a basic orientation to the project, instructions on recording data, and a chance to conduct a few practice interviews. Nonscheduled interviews, at the other extreme, place significant reponsibility on the interviewers and require them to have some knowledge of the content of the interview. Interviews with physicians, for example, would require interviewers who

have a working knowledge of continuing education and some insight into the world of medical practice.

2. *Difficult data analysis.* Highly scheduled interviews yield data similar to a mail survey. Except for a few more open-ended questions, most of the data are forced-choice responses, which can be analyzed quantitatively. For moderately scheduled and nonscheduled interviews, however, most, if not all, of the data require a more difficult qualitative analysis.

3. *Costly process.* Interviews result in more staff time and direct expenses than do mail surveys. Interviewer training and data analysis are two time-consuming activities. Interviewers may have to be paid for time spent conducting the interviews and traveling to and from the interview site. Travel expenses are typically greater than postage for a survey.

Key Points

Pilot testing questions, asking questions in the right order, and keeping the list of questions as short as possible apply equally to interviews and surveys. The following key points apply especially to interviews:

1. *Introduce the project in advance of the interviews.* Call respondents to ask them to participate in the interviews. State the purpose, goal, and sponsorship of the project. Explain how the respondents were selected, and assure them that responses will be kept confidential. Arrange for an interview at their office or other convenient location, and state how long the interview will take. For especially busy professional people, you may want to send a brief letter explaining the project a few days before the initial telephone call.

2. *Select more respondents than are needed for the interviews.* Not everyone will agree to participate. Some people will be too busy, others will be unavailable when you need them, and others will simply decline. Still others will be difficult to contact. Decide how many attempts to make to reach them before substituting other respondents.

3. *Choose interviewers who enjoy one-on-one interaction.* Interviewers need to put respondents at ease and encourage them to talk freely. They should be good listeners who know when to interject supportive comments and follow-up questions. They also need to observe and interpret nonverbal cues. People who are at ease with a one-on-one, face-to-face situation are best able to satisfy these demands.

4. *Record data in the least complicated way.* In most cases, tape recording interviews is not advisable. Market research projects do not require analysis of every word uttered. Tape recording is also expensive. Transcribing a one-hour interview takes from two to six hours (Gorden, 1987, p. 263).

Instead, interviewers can take extensive notes during the interviews. Or they can limit themselves to key words and phrases to help write a detailed summary as soon as possible after the interview.

Telephone Interviews

An alternative to face-to-face interviews is to use the telephone. Telephone interviews are especially appropriate if you or your respondents are pressed for time. They work best as highly scheduled interviews. Compared with face-to-face interviews, telephone interviews have several advantages and disadvantages.

Advantages

1. *Better response rate.* Some people who are too busy for a face-to-face interview or are uncomfortable with it will take a few minutes for a telephone interview.

2. *More immediate information.* Like face-to-face interviews, telephone interviews provide information quickly. They can offer even more immediate feedback if the interview can be conducted with just one call.

3. *Less interviewer training.* Because telephone interviews typically are highly scheduled, the interviewers need less training. Some training is still necessary and some knowledge of the project is helpful. But the interview schedule gives them specific questions to ask and instructions to follow. If appropriate, staff members or volunteers in the organization can help with interviewing, which contributes to their own professional development

4. *Less difficult data analysis.* Because telephone interviews typically use a highly scheduled approach, more quantitative data are obtained than in face-to-face interviews. Qualitative data from telephone interviews are usually short answers which can be analyzed quickly.

5. *Less costly process.* Telephone interviews normally require less time. They do not take as long to conduct and do not require travel. Face-to-face interviews may last as long as an hour, but phone interviews for market research should be limited to fifteen or twenty minutes. Five or ten minutes may often be enough. For some projects, long distance telehone calls are necessary, but they cost significantly less than travel to faraway places. Since data analysis is simpler, it will require less staff time.

Disadvantages

1. *More limited information.* Obtaining thorough responses to open-ended questions is more difficult on the telephone. Respondents lack the verbal and nonverbal cues that face-to-face interviewers provide to encourage thoughtful and detailed answers. As a result, typically a response is

shorter than it would be if respondents were asked the same question in person. The type of questions appropriate for a telephone interview is also more limited. Respondents find complex questions more difficult to keep in mind on the phone than they would face-to-face. Fewer follow-up questions are possible as well.

2. *Less insight into motivation.* Telephone interviewers have some sense of how strongly respondents feel about their answers and how motivated they are to participate in a continuing education program. They cannot sense the full range of emotion present in a face-to-face interview, however, because they have to depend on voice alone.

Key Points

The key points for telephone interviewing are similar to face-to-face interviewing, with two exceptions.

1. *Select interviewers who are at ease on the telephone.* Telephone interviewers must establish rapport quickly with respondents, using only their voice. They should, therefore, have pleasant voices and enjoy talking on the telephone with people they do not know.

2. *Rely on note-taking to record data.* Tape-recording is even more inappropriate than for face-to-face interviews. Since telephone interviews follow a structured schedule of questions, most answers can be recorded as the interview proceeds. Open-ended questions may require additional writing and editing immediately after the interview. It is better to take a few notes for those questions during the interview and add to them later than to have long pauses during the interview.

With Groups

Data can also be collected from an entire group. Having a group of respondents together at the same time can save considerable cost, compared with contacting everyone individually. The interaction among individuals in a group can generate ideas that might not emerge on an individual basis.

Gathering an entire group together can be difficult, however, especially professional people. Contacting everyone individually can be simpler than organizing a meeting. A group setting can also result in fewer responses. Time does not always permit group members to say what they would say if contacted individually. Some people may feel inhibited in a group if they have conflicts with other group members or perceive significant status differences.

We will discuss two group methods, nominal groups and focus groups, which are especially suited for formal market research. We will mention

only the advantages and disadvantages of using each method in continuing education, but the points we have just made about working with any group also apply. If you are unfamiliar with these methods, be sure to consult references at the end of this publication. Our discussion is too brief to provide the detailed information necessary to use the methods effectively.

Nominal Group

A highly structured approach to market research, the nominal group technique involves limited interaction among group members. Thus a nominal group is a group in name only. Originally designed for use in business organizations, the entire process includes five stages. Each stage involves "increasingly higher levels of authority within the organization. Lower-level workers identify the problems, but upper-management personnel decide what programs to conduct and what resources to allocate" (Campbell, 1980, p. 17).

In continuing education, nominal groups are often limited to the initial problem identification stage. One or more groups of five to seven participants respond to a single question. For example, they might be asked what economic challenges their community faces or what problems they are experiencing in their professional practice. Without consulting other group members, participants write responses to the question on a note card. In round-robin fashion, they then share their responses, one answer at a time. Each different response is listed on a flipchart.

After all responses have been shared and recorded, participants vote for the most important responses. First, they select a stated number of items they think are most important and rank them in priority order. These votes are tabulated and may be discussed further, followed by a final vote. Each group ranking is then tabulated to form a composite ranking (Gilmore et al.,1989, p. 65). The composite ranking becomes the basis for program planning.

Advantages

1. *Equal opportunity for participation.* Unlike other group methods, a few talkative members cannot dominate the group. Everyone has the same opportunity to offer responses to the group, and the group must consider every response. Gilmore et al. (1989, p. 62) claim that "because of the disciplined process, minority opinions and conflicting ideas are tolerated."

2. *Thoughtful responses.* Participants must take time to write their responses before sharing them with the group. Extroverts may therefore offer more insightful responses than they might in a brainstorming group or open discusssion session. Introverts cannot sit back and let the more talkative people carry the load. Seeing others writing encourages them to consider the question as well.

Disadvantages

1. *Limited data.* The nominal group can respond to only one question. Other group methods can consider as many questions as time allows. Because interaction among group members is restricted, responses are limited to those that members can generate individually. Ideas that might result from typical group interaction are lost.

2. *Lengthy process.* If the entire nominal group process is used, five different stages with five different meetings of five different groups of people are required.

Key Points

1. *Develop a good question.* The question "should be clear and simply stated" (Gilmore et al., 1989, p. 63). Since only one question is used, it has to be good. Generate several alternative questions and pilot test them before selecting one for the nominal group. For example: What is the major problem you are facing in your professional life at this time? Or: What is the major problem in your community at this time?

2. *Choose knowledgeable participants.* Nominal group members need a thorough understanding of the relevant issues, because they must first generate their own written responses without discussion and then prioritize the group's responses.

3. *Choose disciplined participants.* Group members need the ability to work well with the structure that the nominal group imposes. Discussion is more controlled than in most other groups. Participants offer their ideas in specific ways at specific times.

Focus Group

The focus group has its roots in psychiatry and was developed in the 1950s for market research. Today it is widely used in business for marketing purposes and has a growing use in continuing education. A focus group typically includes six to twelve people, reasonably similar in age, occupation, ethnic background, or other demographic characteristics.

Although comparable in size to a nominal group, a focus group is conducted quite differently. It is considerably less structured, resembling a moderately scheduled group interview. The group considers a specific topic, but does not limit itself to just one question. The moderator has to "focus" the discussion on the topic, "skillfully guiding the discussion in a way that stimulates interaction and encourages the sharing of feelings, attitudes, and ideas from all group members" (Gilmore et al., 1989, p. 69).

Advantages

1. *Wide range of information.* A focus group has some of the same advantages of a moderately scheduled interview. Open-ended questions are asked to encourage expression of ideas and emotion. The moderator has a list of questions to ask but, skillfully using follow-up questions, can pursue in greater detail particular issues that concern the group. Unlike members in the nominal group, those in the focus group may discuss and evaluate each other's ideas, which can lead to expression of still other ideas.

2. *Relatively short meeting.* Although preparation and data analysis can be time consuming, the focus group meeting itself can be limited to one hour. A short meeting can encourage busy people to participate.

Disadvantages

1. *Need for trained moderators.* Moderating a focus group is more difficult than facilitating a nominal group. The moderator must know how to keep the discussion on track and when to follow up responses with additional questions. The moderator also must have good group dynamics skills and know how to encourage everyone to participate.

2. *Unequal participation.* Quick-thinking and talkative people may dominate the discussion. As a result, some people will not have the same opportunity to present their ideas and have them evaluated fairly.

3. *Difficult data analysis.* Just as moderating a focus group is more difficult than conducting a nominal group, so is analyzing the resulting data. As in a moderately scheduled or nonscheduled interview, the open-ended questions result in extensive qualitative data. Because these data come from an entire group, analyzing them can be especially difficult.

Key Points

1. *Select a skilled moderator.* For an effective focus group, the moderator "must have good interpersonal communication skills and be able to quickly establish rapport and gain the confidence of the participants" (Gilmore et al., 1989, p. 70). If more than one focus group will be conducted, try to use the same moderator for each group.

2. *Strive for homogeneous groups.* Focus group members need some knowledge of the topics to be discussed and ideally should not know each other. To encourage the best discussion, recruit participants similar in age, gender, ethnic background, education, income, or some other combination of demographic variables. Ideally the moderator should fit the group's characteristics as well. If group members are too dissimilar, their percep-

tions of the issues addressed will differ significantly from each other (Gilmore et al., 1989, p. 71). An ongoing group has more time to work through these different perceptions, but a focus group meets only once for a short time. It should therefore be structured to minimize differences among group members. Each focus group can be very different from the other groups, but within the group the members should be as similar as possible.

3. *Invite more participants than are necessary.* Typically everyone will not come. If you invite twelve carefully chosen people to each group, half that number is still the minimum size necessary for an effective focus group. If they all come, the maximum group size will not be exceeded.

4. *Consider incentives for participation.* People invited to participate in a focus group may not identify with the purpose of the group as strongly as those selected for a nominal group. Some incentive may be necessary to motivate them to participate. Business organizations using focus groups for marketing purposes typically pay participants from $15 to $100. If participants are paid, the total could be as low as $100 or as high as $5,000, depending on the rate and the number of groups used. Monetary rewards may not be possible, but including a meal or some other gratuity can encourage participation.

5. *Consider tape recording the discussion.* Because focus group meetings typically are free-flowing and only moderately structured, an accurate record of the discussion is necessary for later analysis. Videotaping is desirable but may be too expensive and not readily available. Audiotaping can be adequate, especially if the moderator makes note of significant nonverbal behavior during the discussion (Gilmore et al, 1989, p. 73).

6. *Use an observer.* The moderator must concentrate on guiding the discussion and cannot fully attend to what the group is communicating. Studios with one-way observation capacity are sometimes used, but they will not be feasible for most continuing education market research. An observer in the room seated away from it can scrutinize the group unobtrusively. This person can record nonverbal behavior and reflect on the discussion. The observer can also critique the moderator's leadership and make suggestions for later focus group meetings.

7. *Continue focus groups until new ideas become infrequent.* If participants in each group have similar demographic characteristics, new ideas typically cease after three or four focus groups. If each group is quite different, however, more focus groups may be necessary.

These two methods are not the only ways to conduct market research with groups. They are merely two very different methods, chosen because of their growing use in continuing education. Other group methods include planning groups, brainstorming groups, and group observation.

Chapter 4
Importance of the Program Planner

Chapter 1 What Is Market Research?
Chapter 2 Informal Market Research
Chapter 3 Formal Market Research
Chapter 4 Importance of the Program Planner
Chapter 5 Executing Market Research
Conclusion

This discussion of formal strategies is not intended to suggest that market research is simply a straightforward, empirical process. Determining program directions does not happen automatically from a formal research project. Although formal market research can play an important role, "most administrators and program planners rely heavily upon their experience and intuitive judgment in generating program ideas" (Nowlen, 1980, p. 17).

Program planners are critical to market research, but their importance is not always recognized. Instead, planners sometimes feel they should keep their distance and take a mechanical approach to market research. Jerold Apps (1985, p. 174) claims that "making decisions about what is ideal or what should be is something many programmers shun. They proclaim that their role is one of assessing needs, not determining needs."

Program planners, tho[illegible], cannot remain aloof from the process. Apps further argues that needs assessment is not a simple value-free, empirical procedure. Data can be collected empirically, but planners must decide what to do with these data. They must judge what the data mean for continuing education programs. Apps claims that a programmer must "establish priorities concerning which interest areas to program for and thus is making a value decision. . . . It is impossible for a programmer in continuing education to remain neutral" (Apps, 1985, pp. 175-176).

Knowing a variety of formal and informal market research methods is not sufficient. You must decide how to use these methods to benefit your programming. Your own philosophy of education will influence your choice of methods and how you use them, as will personality and past experiences with research methods. Your working environment is also a critical factor because time, money, and personnel available will limit the scope of market research activities. We must now consider how these three factors—your philosophy of education, personal preferences, and working environment—all influence your market research.

Philosophy of Education

Apps (1973) stresses the importance of a working philosophy of education. He claims that what we believe about adults as learners, the purpose of education, the nature of the curriculum, and the learning process all affect our approach to continuing education. He urges us to identify our beliefs about these components of education, examine them for any inadequacies or contradictions, and change our beliefs when necessary.

We may think of a working philosophy of education, if we think of it at all, as applying to the educational program itself. Yet it is also an important foundation for market research. What we believe about the adult learners we serve, the goals of our continuing education programs, the content of these programs, the role of our faculty, and our role as program planners should be consistent with the approach we take with market research.

Two questions illustrate how our philosophy of education influences our market research. First, what is the purpose of our continuing education programs? Second, who should determine the goals and curriculum of these programs? Learners? Professional experts? Supervisors in the workplace? Community leaders? Or you, the program planner?

Purpose of the Program

Considering the purpose of our continuing education programs leads to several other questions. Do you believe your programs should help people adapt to changes occurring in our society? Or should they challenge people to work for change in their professions and in their communities? Are changes occurring that improve our communities, or do they result in harmful consequences? Do you believe your programs should keep up with what other providers offer? Or do you want to develop a distinctive niche for your organization's offerings?

What you believe about the purpose of your programs relates to who should determine goals and curriculum. If you want to help people adapt to change, you need to determine what changes have occurred and what concerns people have as a result. You can gather some of this information informally through reading and talking with colleagues. It is critical, however, to ask people directly how their lives have changed and what difficulties they are experiencing. Surveys and interviews are excellent methods for obtaining this information from potential participants in your programs. For a program that aims to help people adapt to change, then, the learners play an important part in determining goals and curriculum.

On the other hand, if you want your programs to bring a more prophetic message, challenging the easily adopted, widely held assumptions underlying contemporary cultural trends, the learner may not be as important for market research. Professional and community leaders can identify problems in our society and offer their ideas for change. Several methods are useful for gathering this information, including informal conversation, surveys, and nominal groups. Your perspective is especially important as well. Be sure to cultivate your own ideas through reading, informal conversations with colleagues, and reflection.

Program catalogs and brochures from other continuing education providers are always a useful source of ideas. If you want your programs to have their own identity, however, you do not want to offer every program other organizations do. Your own ideas, and those of colleagues in your organization, are critical for developing a special niche. The more creative these ideas are, the more distinctive your programs will be.

Deciding Who Determines Goals

The way you do market research will be influenced by who you believe should determine program goals and directions. If you believe that learners should determine their own needs, be sure to ask potential participants what their needs are. Surveys, interviews, and focus groups, for example, are good methods for obtaining felt needs directly from learners. If you believe that professional and community leaders are a better source of information, the Delphi and nominal group techniques are especially appropriate. If you believe that the program planner should have a major influence on program goals and curriculum, be sure to cultivate your own ideas through informal market research.

We do not mean to imply, however, that you should never do informal market research if you believe adults should determine their own learning needs. Nor do we mean that you should never use surveys or nominal groups if you believe the program planner should have a strong influence on program goals and curriculum. What we do mean is that some market research approaches are more consistent than others with your own personal philosophy of education.

We especially want to warn against market research approaches that are inconsistent with your philosophy of education. If you believe, for example, that learners should determine their own learning needs, do not limit your research to personal reading and reflection. By themselves those activities would be inconsistent with your philosophy. Be sure to employ research methods that allow learners to express their needs to you. Similarly, if you believe that the program planner should propose program ideas, do not spend all your time collecting data from potential participants. Be sure your research activities help you formulate good ideas.

Personal Preferences

In addition to your philosophy of education, personal preferences influence how you do market research. Your personality and working style enable you to enjoy some activities, and succeed with them, more than others. Past experiences with certain research methods have helped you develop skills for those methods.

Because of these personal preferences, planners will gravitate to some research methods more than to others. Do you like working with groups? If so, you may think first about forming a planning committee before doing any market research. Or you might want to organize a focus group or nominal group exercise for community leaders. Do you enjoy talking with people one-on-one? If so, you may look forward to a series of face-to-face interviews with potential participants. If these interviews make you uncomfortable, you may prefer the telephone.

Or do you prefer working alone? Have you had your fill of meetings? Do you like developing your own ideas better than collaborating with others? Your favorite form of market research may be crawling into a corner of the library with the latest professional journals and popular periodicals. Do you like data analysis and writing? If so, you may think first of a mail survey.

The balance achieved between reading, thinking, and talking with people will depend on your personality. Many people attend conferences to meet new people, talk with them about their programs, and come away with new ideas. Some of us look forward to conferences as a time to reflect. Great ideas can emerge in the middle of a session, whether boring or exciting. These ideas have very little to do with talking to new people. They have a lot to do with the way we think and get new ideas.

Using your preferred research methods is often appropriate. Understand the approaches you prefer and accept your tendency to gravitate to them. If you like a particular approach and are comfortable with it, you will work hard at it and do it well. If you have had experience with a certain method, you will have developed skills to use that method well. Use these methods especially when time and money are at a premium.

Using only your preferred approaches, however, can be too limiting. If you always conduct a mail survey with potential participants, you will have only their ideas on what is needed. You will not have the perspective, for example, of leaders in their community. You will also continually gather information that has inherent mail survey biases. If you always limit market research to library activity, you will not know if anyone besides yourself has any interest in coming to your programs. When the time is right, try to broaden your repertoire of market research skills. Move out of your comfort zone, and use the opportunity for professional growth.

Working Environment

Your working environment also governs your approach to market research. Given your philosophy of education and personal preferences, you know the methods you would like to use. You need the opportunity, however, to use them appropriately in your own organization.

We sometimes think of market research as a major project, involving several staff members and thousands of dollars. Although a few projects are that large, most are on a much smaller scale. Nowlen (1980, p. 25) cites one study which found that, for universities at least, "most of the research conducted to determine program ideas is done in house by personnel for whom conducting research represents only one of their responsibilities." Market research is probably only one of your responsibilities as well. The challenge is to fit market research into all the other demands of your job.

Personnel and Financial Resources

One challenge is to find the necessary resources. If your organization does not specialize in research, an expert staff will not be at your command to help with research design, data collection, and analysis. You may also have limited financial resources with which to pay for a research project. Time is another scarce resource. You have many other programming responsibilities, with their own deadlines and financial obligations. You cannot devote as much time to market research as you would like. The time you do have may not be in extended blocks.

Given these resource limitations, informal market research is very important. Even with limited time or money, you can always talk with colleagues about program ideas, review promotional materials from other providers, and read professional and popular literature.

Organizational Culture

Another challenge in your working environment is the culture of the organization. Your organization has a history of doing market research in certain ways that you cannot ignore. Your colleagues may place high priority on working with advisory committees to plan progams. Standing committees may always plan the annual conferences. To avoid these groups while you dream up new ideas in the library would obviously get you in trouble. Your colleagues may have strong allegiance to survey research or other formal methods. They may distrust more informal approaches. Or the organization may not have the financial resources to support formal projects, encouraging ongoing informal activity instead. All of these factors in the working environment will influence the choices you make about market research.

Chapter 5
Executing Market Research

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Equipped with a repertoire of formal and informal market research methods and recognizing the influence of your philosophy of education, personal preferences, and working environment, you are finally ready to take the plunge. The ten steps that follow will help you plan and then conduct your market research activities. Thinking through these steps will help determine what methods to use for market research, how often to do it, how extensively you should get involved, and what role other people should play.

Step 1. Decide What to Research.

This step may seem too obvious to mention, but you do not have time to do all the market research you would like to do or feel you need to do. Determine your highest priority for research activity, considering new programs you want to begin soon and ongoing programs you would like to expand or modify in some way.

Step 2. Consider the Resources Available.

For most market research activity, the necessary resources include people, money, and time. What technical expertise is available from the staff in your organization to help with research design, instrument development, data analysis, report writing, and editing? Can some staff members help collect and summarize data? Will planning committee members or other volunteers help with some aspects of the project

How much money can be spent on this activity? Can you afford travel expenses to collect data? If technical expertise is not available in the organization, can you hire consultants or free-lancers to help?

How much time do you have to accomplish this research? Do you have to decide next month whether to scrap an ongoing program? Do you have a year to develop a new program thrust? Can you give a research project your undivided attention for the next three months? Or do you have to fit it into all your regular programming responsibilities?

Step 3. Determine the Best Time to Do Research.

When is the best time for you to conduct market research? When you are beginning to plan and budget for next year's program schedule? At what time of year can you give your best effort to market research? During the winter months when you are not as busy running programs? If you need to collect data, when will the respondents be most accessible? When can you count on the most staff or volunteer help?

Step 4. Choose a Market Research Approach.

On the basis of your answers to the above questions, decide how extensive your effort will be. If you have excellent staff support, a healthy budget, and an adequate block of time, you may want to plan an extensive, formal research project. If you have to do most of the work yourself with a limited budget within a short time frame, a quick survey or a few interviews may be best.

Select the method or methods to be used. Consider the advantages and disadvantages of each method described earlier. If you anticipate formal data collection activity, keep in mind the methods that work best for your respondents. Select methods that are consistent with your philosophy of education and fit your working environment. If time permits, consider a method that requires you to develop new skills. Learning a new method is one way to use market research for professional growth and renewal.

Step 5. Recruit People to Help.

Research should not be done in isolation. Although reading, writing, and data analysis are all solitary activities critical to the success of any research project, other people are important as well. You need them to help formulate your plans, challenge your ideas, reflect on the data collected, speculate on its implications for programming, critique drafts of reports, and generally support your efforts. Stimulation from this interaction will help you work through difficult phases of the project and improve the quality of research. Involving other people in market research can also help you gain renewed perspective on your programming.

Before plunging too far into research activities, then, find other people to work with you. Use an ongoing planning committee or form an advisory group just for this project. Even if you plan low-key, ongoing, informal market research activity, ask at least one other trusted colleague to consult with you from time to time.

Once some kind of support group is in place, determine the personnel you need. You need not be an expert in all phases of market research to do quality work. Secure the services of staff members within your organization who can offer necessary technical expertise, help collect and analyze data, and provide clerical and secretarial support. You may have access to an applied research unit that can handle data collection and analysis. If staff members are not available internally, consider your need for external consultants, data collection assistance, and free-lance writers and editors. Or recruit volunteer help, especially for data collection.

Step 6. Develop a Preliminary Plan for the Research.

The time has come to plan the project. If you plan formal market research, select the population to study. Determine the sample size, and choose the sampling procedures. Do you want to know what will draw the general public to your programs? Or do you want community leaders to suggest programs they believe are needed? Do you plan to sample several hundred potential participants in your programs? Or will you limit the sample to fifty respondents? How will you obtain their names? From the telephone book? From membership lists of professional organizations? Or do you plan to randomly approach people at street corners and shopping malls?

Decide how to collect data and what assistance will be needed. Do you need to develop a questionnaire or interview schedule? Do you have the time and expertise to do so, or do you need technical advice from other people? Will you interview respondents? Do you need help with these interviews? Will you schedule focus group or nominal group meetings? Do you need help planning and conducting these meetings?

Using more than one research method is often desirable. As a validity check, you can compare data collected from one method with data from another method. Do nominal groups of randomly chosen citizens identify the same educational needs as a telephone survey of selected community leaders? It is especially important to consider several methods when you begin a major new program thrust.

Use the people recruited to help design the project, especially if they have technical expertise in research methodology. Consult the references at the end of this publication for additional assistance with research design and sampling procedures.

Although this step has focused on formal research projects, informal reseach requires some planning as well. Decide, for example, whether you will rely on informal conversations or systematic reading or both. Plan how you will fit this research activity into your schedule to ensure that your best intentions are fulfilled.

Step 7. Develop a Budget.

By now you probably have an ambitious plan. If on target, you have carefully assessed available resources and have not exceeded these limitations. Before proceeding further, however, determine the cost of the project. Consider all of the direct costs involved with project development, data collection, and data analysis. Include printing, postage, telephone, travel, computing, and personnel expenses. Do not underestimate or cut corners. It

is better to face a costly budget now than to find yourself in the middle of a project you cannot afford to finish.

Personnel costs are a critical item that can make or break your budget. If you have to hire outside people for technical assistance or data collection or will be charged back for this assistance within your organization, the project will be expensive. If your personnel services will be contributed, however, the project will be much more affordable.

Have someone critique the budget, just as you would ask for reactions to a preliminary research design or draft report. Ask if you have underestimated any items or overlooked other expenses.

If the budget is too large, you will have to limit the the project in some way. You may be able to use only one research method, rather than two or three. If you are not sure where to cut the budget right now, go to the next step.

8. Plan How to Use the Data.

Ask yourself the hard question of how you will actually use all the data you plan to collect. Chances are, you will have more information than you can realistically use to make program decisions. Resist the temptation to collect unnecessary data just because you would like to know more about the respondents. That additional information may very well sit on the shelf unused.

Consider your budget again. If it is more than you can afford, can you save money by collecting only essential data to make informed program decisions? In the excitement of designing a research project, it is tempting to think of all the information you would like to have about your respondents. But the more data you want, the more time and money you will spend collecting, analyzing, and reporting.

Before proceeding to collect the data, make any necessary revisions in the preliminary plan and budget. Be sure this revised plan is affordable and calls for collecting only information that will be used.

Step 9. Collect and Analyze the Data.

If you plan a formal research project, establish procedures for data collection. Surveys and interviews, for example, require a questionnaire or interview schedule. Develop this instrument carefully. Generate a list of questions you think should be asked. Ask those people working with you on the project to suggest questions as well. Share the initial list with as many people as you can, and ask colleagues in the organization to react to the questions. Include people who will help collect and analyze data. Choose the

questions that seem most important, revise them as needed, and develop a draft of your instrument.

Then test and modify the instrument. Ideally, select a small sample of people, similar to the population chosen for the study, to complete the draft instrument. Have them give their reactions to it, including questions they found confusing and the reasoning they used to answer them. If time and money do not permit extensive pilot testing, at least recruit a group of friends and colleagues to work through the sample instrument. On the basis of this feedback, revise the questions and format of the instrument.

Although not all formal market research methods use questionnaires or interview schedules, they do require you to ask questions of respondents. Therefore, selecting the right questions, wording them in the right way, and presenting them in the right format are common problems that must be solved. For a thorough treatment of developing questions, see Sudman and Bradburn (1982). They focus on questionnaires, but their discussion is helpful for other uses too.

For some formal methods, you must also plan how to record data. Interviews, for example, present special challenges. Do you want to rely on notes that the interviewers take during the interviews? Do you want them to refrain from extensive note-taking during the interviews and write detailed summaries immediately afterwards? Or do you want to tape-record the interviews for later transcription? The same questions apply to group discussions. Each technique for recording data has advantages and disadvantages.

Data analysis requires planning as well. Surveys, for example, typically yield quantitative data. The procedures for analyzing quantitative data are straightforward, but you must decide how extensive an analysis to do. Just as we cautioned earlier against collecting too much data, resist the temptation to perform too sophisticated an analysis. Remember that your purpose for conducting market research is to make program decisions. Use an analysis that enables you to make informed decisions. Simple descriptive statistics, for example, frequency distribution, range, and an appropriate measure of central tendency, are often sufficient.

Other research methods, such as interviews, focus groups, and informal research activities, typically yield at least some qualitative data. Analyzing qualitative data is more time consuming and not as straightforward. In some cases, you can assign rankings or weights to qualitative responses and then do a quantitative analysis. In other cases, such coding loses significant information. If this is a problem, develop categories for organizing responses and report the data in narrative form.

As during project planning and budget development, use colleagues to help you with this phase of the research. Tap people with expertise in instrument development and data analysis. If you need additional information, consult the references listed at the end of this publication.

Step 10. Use the Data to Make Decisions.

As with the first step, this final step may also seem obvious, but remember that the purpose of market research is to make informed judgments about programs. These judgments do not result automatically from the data you have collected. You, the program planner, must decide what these data mean for the continuing education programs you conduct.

Although you are ultimately responsible for these decisions, you do not have to make them alone. Involve your planning committee, if there is one, and the staff members in your organization who are working on this research. Report the findings to these colleagues, using the most appropriate format. A written report is the most frequent way of doing so, but it is not always the most effective. Busy people may respond better to a succinct summary of the major conclusions or a series of charts and graphs. Even an informal discussion is sometimes better than a lengthy document to read. Include your interpretations and judgments. Then use your colleagues to help you decide what program decisions to make on the basis of the data.

Conclusion

Chapter 1
What Is Market Research?

Chapter 2
Informal Market Research

Chapter 3
Formal Market Research

Chapter 4
Importance of the Program Planner

Chapter 5
Executing Market Research

Conclusion

This brief discussion has offered our perspective on market research in continuing education. We have stressed that market research is more than needs assessment. It includes attention to learning needs, but it also considers learner motivation to participate in continuing education and the resources to do so. Although determining motivation and resources is more difficult than assessing needs, we have noted how some research approaches can give some insight into these areas.

We have not attempted to present a detailed description of every market research method. Instead, we have selected a few methods frequently used in continuing education, noting their advantages, disadvantages, and key points to consider. For further information about these or other market research methods, consult the references listed below for further study.

We have emphasized your importance to market research as program planner. Your philosophy of education, personal preferences, and response to your working environment are all strong influences on how you do market research. We have encouraged you to become more conscious of how these factors influence you and then consider possible changes in your approach to market research.

We have stressed the importance of ongoing market research. We have tried to be realistic, remembering that you are involved in a variety of programming responsibilities and may have limited time and money for market research projects. We do not want you to conclude that market research is an overwhelming task for a program planner. Rather, it is a way to develop confidence and renewed perspective on program planning.

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Resources for Further Study

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Kotler, P. 1975. *Marketing for non profit organizations*. Englewood Cliffs, N.J.: Prentice-Hall.

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Zikmund, W. G. 1982. *Exploring marketing research*. Chicago: Dryden Press.

Market Research in Continuing Education

Beder, H. (ed.). 1986. *Marketing continuing education*. San Francisco: Jossey-Bass. Includes how to analyze available resources, the needs of learners, and other providers.

Coates, J. 1985. *Enrollment analysis*. Manhattan, Kans.: Learning Resources Network. Discusses program user file, geographic distribution of participants, use of neighborhood statistics, analyzing catalog distribution, and marketing applications.

Falk, C. F., and Miller, P. 1986. *Market research in adult learning*. Manhattan, Kans.: Learning Resources Network. Outlines an approach to systematic market research within a continuing education organization.

Gilmore, G. D., Campbell, M. D., and Becker, B. L. 1989. *Needs assessment strategies for health education and health promotion*. Indianapolis, Ind.: Benchmark Press. Detailed discussion of preparing, conducting, and using results of surveys, Delphi, interviews, nominal groups, focus groups, and other group strategies.

Market Research Methods

Survey

Converse, J. M. 1986. *Survey questions: Handcrafting the standardized questionnaire*. Beverly Hills, Calif.: Sage Publications. Discusses characteristics of good questions, research findings on responses to questions, and steps involved in pilot testing.

Dillman, D. A. 1978. *Mail and telephone surveys: The total design method*. New York: John Wiley and Sons. A step-by-step "total design method" of writing questions, constructing questionnaires, and implementing mail and telephone surveys. Discusses advantages and disadvantages of mail, telephone, and face-to-face surveys.

Draves, W. A. 1988. *High response surveys*. Manhattan, Kans.: Learning Resources Network. Stresses development of short mail surveys for market research, including questions to ask, question phrasing, survey design, increasing responses, and size of mailing.

Erdos, P. N. 1983. *Professional mail surveys*. Malabar, Fla.: Krieger Publishing. Discusses conducting surveys from start to finish, with emphasis on designing surveys to enhance responses.

Fink, A., and Kosecoff, J. 1985. *How to conduct surveys: A step-by-step guide*. Beverly Hills, Calif.: Sage Publications. Includes discussion of sampling, survey design, quantitative data analysis, and reporting results.

Fowler, F. J. 1984. *Survey research methods*. Beverly Hills, Calif.: Sage Publications. Discusses sampling, nonrespondents, questionnaire design, interviewing, quantitative data analysis, and ethical issues.

Frey, J. H. 1983. *Survey research by telephone*. Beverly Hills, Calif.: Sage Publications. Presents advantages and limitations of telephone surveys, questionnaire design, strategies, administration, and costs. Excellent comparison of mail, telephone, and face-to-face surveys.

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Delphi Technique

Delbecq, A. L., Van de Ven, A. H., and Gustafson, D. H. 1975. *Group techniques for program planning: A guide to nominal group and Delphi processes*. Glenview, Ill.: Scott, Foresman, and Company. Gives detailed description and application of nominal group and Delphi techniques.

Linstone, H., and Turoff, M. (eds.). 1975. *The Delphi method: Techniques and applications*. New York: Addison-Wesley Publishing. Presents a thorough review of underlying philosophy, applications, research studies evaluating the Delphi, specialized techniques, and anticipated future uses.

Interviewing

Briggs, C. L. 1986. *Learning how to ask: A sociolinguistic appraisal of the role of the interview in social science research.* Cambridge: Cambridge University Press. Advanced discussion of interviewing in field research. Includes a chapter on four-phase approach to conducting interviews and interpreting data.

Gorden, R. L. 1987. *Interviewing: Strategy, techniques, and tactics.* Chicago: Dorsey Press. Presents an in-depth treatment that includes selecting interviewers, conducting interviews, questioning techniques, and case studies.

Kahn, R. L., and Cannell, C. F. 1957. *The dynamics of interviewing: Theory, techniques, and cases.* New York: Wiley. Old but still useful discussion of interviewing theory, principles, and techniques, plus critiques of interview transcripts.

Nominal Group

Delbecq, A. L., Van de Ven, A. H., and Gustafson, D. H. 1975. *Group techniques for program planning: A guide to nominal group and Delphi processes.* Glenview, Ill.: Scott, Foresman, and Company. Gives detailed description and application of nominal group and Delphi techniques.

Focus Group

Bellenger, D. N., Bernhardt, K. L., and Goldstucker, J. L. 1976. *Qualitative research in marketing.* Chicago: American Marketing Association. Includes a chapter on focus group uses and techniques.

Goldman, A. E., and McDonald, S. S. 1987. *The group depth interview: Principles and practice.* Englewood Cliffs, N.J.: Prentice-Hall. Presents a thorough discussion of how to conduct effective focus group interviews, including moderator preparation, observation guidelines, data analysis, and report writing.

Krueger, R. A. 1988. *Focus groups: A practical guide for applied research.* Beverly Hills, Calif.: Sage Publications. Applies focus groups to nonprofit organizations, including characteristics and uses of focus groups, advantages and limitations, strategies for conducting focus groups, and issues to consider.

Morgan, D. 1988. *Focus groups as qualitative research.* Beverly Hills, Calif.: Sage Publications. Applies focus group to social science setting.

Research Skills

Quantitative Research

Best, J. W., and Kahn, J. V. 1989. *Research in education*. Englewood Cliffs, N.J.: Prentice-Hall. Includes discussion of sampling and data analysis.

Borg, W., and Gall, M. 1983. *Educational research*. New York: Longman. Includes detailed chapters on sampling and statistical analysis.

Boyd, H. W., Westfall, R., and Starch, S. T. 1981. *Marketing research: Text and cases*. Homewood, Ill.: Irwin. Includes discussion and case examples of sampling and data analysis.

Charles, C. M. 1988. *Introduction to educational research*. White Plains, N.Y.: Longman. Presents an introductory treatment of data collection, sampling, and statistical procedures.

Churchill, G. 1979. *Marketing research: Methodological foundations*. Hinsdale, Ill.: Dryden Press. Gives a clear presentation of research design, sampling, data collection, analysis, and reporting.

Qualitative Research

Berg, B. L. 1989. *Qualitative research methods for the social sciences*. Boston: Allyn and Bacon.

Merriam, S. B. 1988. *Case study research in education: A qualitative approach*. San Francisco: Jossey-Bass. Includes discussion of effective interviewing, observation, data analysis, and reporting information.